

**Presenter's Funding Party Checklist**

- \_\_\_ Business cards
- \_\_\_ Securities (blue sky filing) or SEC filing document
- \_\_\_ Sample of 'thing' or example of 'service'
- \_\_\_ 1/3 page color strike card
- \_\_\_ One board display (color)
- \_\_\_ One page summary (color) with:
  - Concept statement
    - what, how, when, where, who, how much, exit
  - Spreadsheet projection - annual with three years
    - revenue, direct costs, gross margin, expenses, capital influx, cash flow
  - Bio sketch of key personnel
- \_\_\_ Brief business plan - three pages
- \_\_\_ Complete Business Plan  
(Non - disclosure agreements may be required to release complete business plan)
- \_\_\_ Web site and social media sites (Facebook, Twitter, blog)
- \_\_\_ Insiders, sympathizers - people connected with target financiers